

## Training Module

# Telephones and marketing

Projecting a positive image for  
your organization

The module includes  
Instructor's Guide  
Participant's Manual

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# Telephones and marketing

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## Participant Manual

## About this module

**T**his training module is designed to provide employees in assisted living programs with a basic understanding of good telephone etiquette. You have already taken the pre-test, but don't worry—it won't be graded! It's just a way to help you measure your current understanding of what constitutes good telephone communication skills. After each section, you will see a key, with a brief statement next to it. These "key concepts" are the important ideas that will help you improve your telephone skills.

Your participation in this training module should result in a better understanding of:

- Basic telephone etiquette
- The importance of understanding the technology
- Strategies to put the caller at ease
- The importance of telephone etiquette in creating a positive image for your program
- The important role of the telephone in your program's marketing efforts.

When you finish the module, you will take a post test, but don't worry—it's won't be graded either! It's primarily just to reinforce the ideas presented and to spark discussion with your co-workers. If you're lucky, maybe the instructor will offer a prize to the employee with the best post-test, or maybe a little reward for the person who showed the greatest improvement between the pre- and post-tests. If there are no prizes, remember that education is its own reward (or that's what those who never offer prizes always tell us!).

## Communication Basics



### Good telephone skills can generate business

**E**ven before the telephone is answered, the caller can develop an image of your organization. A telephone that rings and rings unanswered has the same result as refusing to answer the doorbell. How can your organization take care of my loved one if there is no one home? If the employee who answers the phone does not give the caller their full attention or answers in a rude manner, the caller may be well on their way to writing your organization off as cold and uncaring—the kind of organization they would never choose to do business with.

There are some basic principles of telephone etiquette that you should be familiar with before you are given responsibility for answering phones. The purpose of answering the phone is not to stop it from ringing. The purpose of answering the phone is to receive and provide information that is critical to your business. Whether it is a tenant's family member or a potential client, your assisted living program cannot afford to lose business or compromise the quality of care provided because you don't take time to employ the essentials of good telephone communication.



## Understand key phone functions

As telephone systems become more and more complex, it is becoming increasingly important for employees to understand the mechanics of the telephone. Part of your orientation should include a session on how to operate the telephones. You can't provide stellar telephone services if you don't know how to place callers on hold or how to transfer a call.

If you are a new employee, or your organization installs a new telephone system, make yourself a "cheat sheet" from a 3 x 5 card that contains instructions on how to manage key functions of the phone. Carry it in your pocket as a quick reference. In a few weeks, after you've mastered all the functions, the card will seem ridiculous. In the meantime, it can save a lot of time and energy and help you ensure that you are handling the phone in a professional manner that projects a positive image.



## Answer the phone within three rings.

Your assisted living program is a health care facility, and health care facilities should provide telephone coverage 24-hours a day, seven days a week. While there will most likely be more staff to answer the phone during the day shift, using good telephone communication techniques is equally important for staff members on all shifts.

Callers expect the telephone to be answered quickly. Unless you are dealing with a tenant emergency that requires the attention of every single staff member, the **phone should be answered within three rings**. If the person assigned to answer the phone needs to give undivided attention to a tenant, the phone should be handed off to another employee to answer. You should not be expected to answer the telephone on a scheduled break. The purpose of a break is to allow you a brief period of time away from the pressures of work.



## Develop a standard, three-part greeting

The person who answers the phone is setting the tone, not just for a conversation but for an entire organization. The first three or four seconds are critical, because you never get a second chance to make a good first impression.

In order to project a positive, consistent image, it's important for employees to agree upon a standard greeting. A standard greeting helps to create a consistent image, sometimes referred to as "branding." Callers know immediately that they've reached your organization, because they recognize the standard greeting.

In creating a standard greeting, it's a good idea to consider a three-pronged greeting. The three-pronged greeting includes a buffer, the organization's name, and the name of the employee answering the call.

### **Buffers**

Begin by creating a “buffer” that precedes your company’s name and your name. Some possible buffers might include:

“Good morning”  
“Good afternoon”  
“Thank you for calling”  
“You’ve reached”  
“Happy Holidays”  
“We’re glad you called”

### **Organizational name**

Speak the organization’s name clearly. Don’t leave callers guessing if they’ve reached the right number.

### **Your name**

It’s best to offer only your first name. Last names can be complicated, and unless you work in a really large organization, it is unlikely that anyone else will have the exact same first name as you. Preface your name with “this is.” Do not use “speaking” after your name (i.e., “Tammy speaking”). It makes callers wonder if “speaking” might be your last name.

### **Putting it all together**

Here are some sample three-pronged greetings:

“Good morning, Werther’s Assisted Living, this is Candy.”  
“You’ve reached Famous Amos Assisted Living, this is Cookie.”  
“Happy Holidays from Lay’s Assisted Living, this is Chip.”



## **Give callers options & keep them posted**

**D**o you like to be placed on hold when you call an organization to gather information? Most people would probably say they don’t like to be placed on hold, but sometimes, especially in health care, placing callers on hold is unavoidable. Some things to remember before placing a caller on hold:

**Advise the caller why they are being placed on hold** (i.e., you are going to find someone to talk with them, or you are going to search for the requested information). Callers should be left on hold for no more than 30 seconds without an update as to the progress you are making in managing their request.

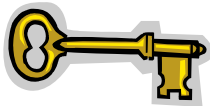
**Offer to give the caller a call back** if you anticipate completing a task will take more than 30 seconds.

**Keep the caller updated** if you are searching for information or for a staff member (i.e., the employee is with a client but she should be finished within one minute). Offer to take the caller’s number so the employee can call back when he/she is available.

### Other things that callers hate:

- Mouth noises (i.e., chewing gum, eating)
- Poor screening
- Rudeness
- Hang-ups
- Call waiting

***Hot tip:*** Always thank the caller for holding when you return to the phone!



### Screen calls appropriately to build trust

The only purpose for screening calls is to be able to announce the caller to the recipient. If you ask the caller for his or her name, the person receiving the call should be able to warmly greet the caller, rather than trying to figure out who is on the other end of the line. If you answer the phone and ask the caller for a name, and the caller has to then repeat their name to the recipient, it is apparent that the purpose of your screening was not to announce them but just for your own personal information.

When you are screening calls, be careful that the caller does not get the indication that they are being screened out. When the caller asks if your director is available, do not respond with, “Yes, she is.” If you’ve already confirmed that the director is available, but the director doesn’t have time to take the call, there will have to be some sort of “brush off.” Instead, indicate that you will check to see if he/she is available.

#### ***Example:***

**Caller:** Hello, is your director available?

**Your response:** May I tell her who’s calling? (*you didn’t say whether the director was available or not*)

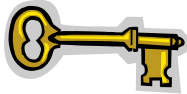
**Caller:** This is Mary Bauer.

**Your response:** Thank you. Just a moment, please, Mary, and I’ll see if our director is available.

This allows you some wiggle room if Mary Bauer is someone your director does not want to make time for at the moment. You can simply return to the caller and advise her that the director is not currently available but that she will give a call back as soon as her schedule allows. Or your director might give you the name of another employee Mary Bauer should be referred to.

Avoid giving the caller a rundown of why the director isn’t available. “She’s in a meeting,” gives the caller the expectation that as soon as the meeting is over, they will get a call back. “She stepped out of her office,” gives the caller a visual of the director running away when she heard who was calling. Just stick to the simple fact that the director is unavailable.

If the caller seems desperate to know when the director might return a call, give a general timeframe. For instance, you might tell the caller you anticipate the director will be able to get back with her within the next few hours. Or maybe the director is in an all-morning meeting, and you could tell the caller that she is unavailable in the morning but should be able to return a call in the early afternoon.



## **Avoid using phrases that frustrate the caller**

**T**here are some key phrases that you should avoid when speaking with callers. These phrases create tension with the caller and should be avoided:

I don't know  
We can't do that  
You'll have to  
I told you  
You don't understand  
Wait a minute...slow down

Can you think of some better ways to get across the same messages?

## **The telephone's role in marketing**

**W**hether it's a family member calling about a tenant, a vendor trying to sell a product to your organization, or a potential client, every telephone conversation brings with it an opportunity to generate new business for your organization. Maybe your director is not available to talk with a daughter about her mother's rent. Maybe your organization is not in a position to buy what a vendor is selling. And maybe the caller who wants more information about your organization is just a "tire kicker." But every single call brings with it a golden opportunity for you to increase your value to the organization you work for by projecting a positive, professional image.



## **Understand the goal of telephone marketing**

**W**hen you receive a call from a potential client or a family member, you should be purpose-driven as you converse with the caller. In other words, you aren't looking for a random chat—you are both seeking and providing specific information to the caller.

Your goal as an employee who receives a telephone call is to make your program sound so appealing that nothing could keep the caller from scheduling a visit.

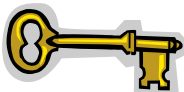


## Create a uniform method to gather information

**T**elephone coverage and message taking in assisted living goes way beyond the “while you were out” pad. Note pads are fine for capturing information for employees to return routine calls. But when it comes to dealing with potential clients, it’s time to get out the “lead card.”

The lead card is a tool that assisted living programs can utilize to capture all pertinent information about the potential client. It is essential to know the potential client’s current situation so that you can sell the caller on the advantages of choosing your assisted living program. Lead cards can serve a number of valuable purposes, including:

- Keeping the director/marketing staff advised of potential clients
- Helping the director know the caller’s situation so the caller doesn’t have to tell it again
- Tracking the status of all potential clients (i.e., still interested, not ready)
- Documents marketing efforts (i.e., packet mailed, tour scheduled, etc.)
- Shows whether marketing efforts (i.e., ads, family referrals) are effective
- Serves as a reference for every staff member answering the telephone
- Helps your program build a database of potential clients for direct mailing efforts



## Organization helps your program track information

**T**he lead card is designed to help capture every piece of information your organization has deemed important in its marketing efforts. You may be a bit uncomfortable asking the caller, “May I ask where you heard about us?” But your program may have invested a considerable amount of time and effort in developing advertisements or building relationships, and the only way to know if efforts are effective is to simply ask the caller.

### Tips for using the lead card:

Capture the name when the caller identifies himself/herself, but do not ask for address and phone number immediately. The first task at hand is to build rapport and to make the caller feel comfortable. Asking for personal information up front gives the call a “sales” feel, and callers will spend a considerable amount of time telling you they are “just looking,” to avoid being pressured.

Here’s a suggested order of events:

1. Jot down the caller’s name when they give it.
2. Thank the caller for calling your program.
3. Let the caller know your name and your position with the organization.
4. Ask, “May I ask how you heard about us?”
5. Ask if the caller is looking for assisted living for herself/himself or a family member (if they haven’t already told you so).



6. Invite the caller to tell you “a little bit about the person”
7. As the caller talks about the prospect’s current situation, use the lead card to ask questions and gather additional information (“Is your mother able to get dressed without assistance?” “Does your mother take any medications?” “Does your mother have any major health issues?” “Is your mother able to take care of her own toileting needs?” “Is your mother able to shower or bathe independently?”)
8. Listen attentively while the caller provides necessary information
9. If the caller is a daughter who has been providing care to her mother, acknowledge the daughter’s contribution (“I know it can be very difficult to try to care for an elderly parent, and it sounds like you’ve done a great job taking care of your mom.”)
10. After you have gathered all necessary information, begin to talk about all your program can offer, based on the established needs of the prospect. (“You indicated your mother does not take her medications appropriately. We can provide 24-hour-a-day supervision and we have an R.N. that oversees tenant’s medications. Staff can remind tenants to take medicine, or we can administer them in the tenant’s room.”)
11. When you have finished advising the caller of all your program has to offer, extend an invitation to come in for a tour and a complimentary meal. If the caller doesn’t want to commit to a specific time, advise that he/she can stop by anytime for a tour.
12. If the caller declines to be scheduled for a tour, ask if you can put some information in the mail. This is a good time to ask for the correct spelling of the caller’s name, the address and the phone number.
13. Ask permission to have the marketing director or program director contact them within the week to see if they received written information and to answer any questions they might have.
14. Ensure that you have the proper spelling of the caller’s name, and repeat the address and phone number to ensure you have correct information.
15. Thank the caller for their interest and wish them well in their search for the right choice.



## Dealing with the “Big Four”

**P**eople don’t make a decision to enter your facility based solely on a phone conversation. But they can make a decision not to consider your program, depending on how you respond to some key questions they might ask.

Many times a family member has been asked to do some ground work for the senior who may be interested in assisted living. Pricing from one assisted living program to the next is not generally consistent, as programs have many different billing structures. Some provide all needed services for one set price (all-inclusive pricing), some programs choose a service level structure, where there is a correlation between the packaged service hours and price, and some choose an ala carte system, where tenants choose and pay for only the services needed on a monthly basis. And, of course, the size of the room always influences the price. This can create a great deal of confusion for consumers, because they cannot compare “apples to apples.”

Your response to the “big four” can determine whether you are able to convince the prospect to give your program serious consideration. Follow the suggestions below to ensure that your response does not result in a lost client for your organization.

### ***#1: What are your rates?***

**B**ecause affordable assisted living programs have a unique cost and billing structure, you won't be able to offer specific rate information over the phone. Pricing in affordable assisted living programs can be complicated, depending on the client's income and assets and the number of subsidy programs involved. Each tenant's costs for rent and services are unique, and many programs have no two clients who pay the same rate.

You want to encourage the caller to come in and take a look at all you have to offer. You can offer to conduct a free financial and health assessment, so that you can provide specific costs. Here are a couple of ways you can frame this conversation for the caller who seems determined to squeeze a specific price out of you:

“We would need to conduct a free assessment to determine your mother's needs, and she would need to choose an apartment size. We would have to take a look at her income, assets, and health care needs, and then we would be able to tell you the exact cost.”

“Some of our clients pay as low as \$300 (or whatever your lowest package might be) a month for rent and services, but some pay considerably more. Rent and services are based on income, assets, and health care needs. Some clients also qualify for assistance with the cost of health care. We can conduct a free assessment and then we would be able to give you a specific price.”

### ***#2: What kinds of services can you provide?***

**W**hen people are seeking information about assisted living programs, they want to be able to compare one program to another. They may have a checklist of things that are important to them. Iowa assisted living law allows providers a great deal of flexibility in determining what kinds of services they want to provide. If the caller's mother has dementia, she may be specifically interested in what kinds of oversight you can provide to prevent wandering.

It is important that you know enough about the prospective client's needs to be able to answer questions in a manner that peaks the interest of the caller. If you know the prospective client enjoys walking, talk about your tenant walker's club. If falls are an issue, talk about hand railings on both sides of the hallway, emergency response procedures, and remind the caller that you have an R.N. that can work with the family and the physician to develop a falls prevention plan.

### ***#3: Can you take my mom to doctor's appointments?***

Many times a caller has been taking care of a loved one in the home. The demands of caring for a parent while raising children can eventually become overwhelming, and they are now to the point that they are willing to consider alternative arrangements. Sometimes the child is able to manage the care needs, but they cannot keep up with medical appointments. They are using vacation to shuttle the parent back and forth to different appointments, and they finally become physically and emotionally exhausted.

Your program may not have a van to take clients to medical appointments. But what other resources do you have to help meet the transportation needs of clients? Maybe your program arranges a community van for seniors to transport clients to appointments. Maybe the program is willing to pay for taxi service to appointments. Or maybe the program has enough staff to be able to send a caregiver or nurse with the client to the appointment in a private vehicle.

Transportation for some clients will be covered under government subsidy programs, and some clients may be assessed a small fee for the cost of transportation. Use whatever means available to your program to help meet the transportation needs of clients, as assistance in getting the client to doctor's appointments is a high priority for most clients and their family members.

### ***#4: What if my mom's condition gets worse?***

The decision to consider assisted living is not made easily, and it usually comes at a point where the individual's health is in a significant state of decline. If the individual suffers from a progressively debilitating disease, families will want to know how long the individual will be able to stay in your program. It is very difficult for frail seniors to withstand a move, and the family will want assurances that you can keep the client for a significant period of time.

Your program will have occupancy and discharge criteria, which will be made available to prospective clients before they sign a lease and service agreement. This allows families to make an informed decision about whether your program is right for their loved one. Programs with a dementia unit have great ability to care for clients suffering from dementia, even in the advanced stages of the disease.

If you are fielding telephone calls, you should have a good understanding of what kinds of services your program delivers and what kinds of issues would trigger a discharge. You can assure the caller that your nurse will be working with the prospect's physician to manage all aspects of healthcare. If the client's condition worsens to the point that alternative placement is imminent, the tenant and family will be intimately involved in those discussions. Letting the caller know that there will be no surprises when it comes to discharge or transfer gives them a greater level of comfort about their decision.



## You have the power...

**Y**ou have the power to create for the caller a visual image of your facility that is so intriguing that people just have to see it to believe it. Your demeanor and professionalism speak volumes about you and the organization you work for. It's a simple concept: Nobody wants to live or place a loved one in a program where crabby, disinterested people are providing care.

While callers and guests will probably want to meet your program's management, the decision to choose a program will ultimately be made based on the prospect's perceptions of the care-giving staff. You are the backbone of your organization, and you are in a unique position to market all that you and the organization have to offer. Understanding the basics of telephone etiquette and marketing empowers you to increase your value and improve the image of your organization. By keeping a positive attitude and projecting a professional image, you can create a better living environment for tenants and a better work life for you and your fellow employees. Use your incredible powers for good, and you will reap the benefits both personally and professionally.

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## Instructor's Manual

## **Preparation suggestions for Instructor:**

**Time required for module:** One hour.

**Materials provided:** Photocopy one for each attendee: Participant manual, test and sample lead card

**Additional materials:** Pencils, one or two small prizes (optional - for best pre-test score and most improved from pre-test to post-test)

## **Module flow & suggestions**

The instructor's module contains the same text as the participant guide, with notes (in this font) to spark discussion inserted after each section.

Before distributing the participant manual, hand out the test. Allow participants about five minutes to take the pre-test. Do not collect the tests. They will also be used to conduct the post-test.

Ask for volunteers to read aloud for each section. Cover the key concept, then use the idea at the end of the section to trigger discussion related to your program.

## **About this module**

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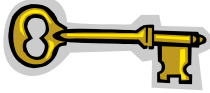
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- The importance of telephone etiquette in creating a positive image for your program
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greatest improvement between the pre- and post-tests. If there are no prizes, remember that education is its own reward

## Communication Basics



### Good telephone skills generate business

**E**ven before the telephone is answered, the caller can develop an image of your organization. A telephone that rings and rings unanswered has the same result as refusing to answer the doorbell. How can your organization take care of my loved one if there is no one home? If the employee who answers the phone does not give the caller their full attention or answers in a rude manner, the caller may be well on their way to writing your organization off as cold and uncaring—the kind of organization they would never choose to do business with.

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**Instructor:** Add any personal reflections of your current telephone communication issues.



### Understand key phone functions.

**A**s telephone systems become more and more complex, it is becoming increasingly important for employees to understand the mechanics of the telephone. Part of your orientation should include a session on how to operate the telephones. You can't provide stellar telephone services if you don't know how to place callers on hold or how to transfer a call.

If you are a new employee, or your organization installs a new telephone system, make yourself a "cheat sheet" from a 3 x 5 card that contains instructions on how to manage key functions of the phone. Carry it in your pocket as a quick reference. In a few weeks, after you've mastered all the functions, the card will seem ridiculous. In the meantime, it can save a lot of time and energy and help you ensure that you are handling the phone in a professional manner that projects a positive image.

Allow participants to discuss any issues they have with your current technology.



## Answer the phone within three rings.

Your assisted living program is a health care facility, and health care facilities should provide telephone coverage 24-hours a day, seven days a week. While there will most likely be more staff to answer the phone during the day shift, using good telephone communication techniques is equally important for staff members on all shifts.

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**Instructor:** Allow participants to briefly discuss how they measure up in regard to the three rings concept.



## Develop a standard, three-part greeting

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In order to project a positive, consistent image, it's important for employees to agree upon a standard greeting. A standard greeting helps to create a consistent image, sometimes referred to as "branding." Callers know immediately that they've reached your organization, because they recognize the standard greeting.

In creating a standard greeting, it's a good idea to consider a three-pronged greeting. The three-pronged greeting includes a buffer, the organization's name, and the name of the employee answering the call.

### Buffers

Begin by creating a "buffer" that precedes your company's name and your name. Some possible buffers might include:

- "Good morning"
- "Good afternoon"
- "Thank you for calling"
- "You've reached"
- "Happy Holidays"
- "We're glad you called"



### **Organizational name**

Speak the organization's name clearly. Don't leave callers guessing if they've reached the right number.

### **Your name**

It's best to offer only your first name. Last names can be complicated, and unless you work in a really large organization, it is unlikely that anyone else will have the exact same first name as you. Preface your name with "this is." Do not use "speaking" after your name (i.e., "Tammy speaking"). It makes callers wonder if "speaking" might be your last name.

### **Putting it all together**

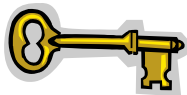
Here are some sample three-pronged greetings:

"Good morning, Werther's Assisted Living, this is Candy."

"You've reached Famous Amos Assisted Living, this is Cookie."

"Happy Holidays from Lay's Assisted Living, this is Chip."

**Instructor:** Let employees discuss and agree upon a standard greeting for your organization.



## **Give callers options & keep them posted**

**D**o you like to be placed on hold when you call an organization to gather information? Most people would probably say they don't like to be placed on hold, but sometimes, especially in health care, placing callers on hold is unavoidable. Some things to remember before placing a caller on hold:

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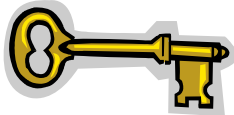
**Keep the caller updated** if you are searching for information or for a staff member (i.e., the employee is with a client but she should be finished within one minute). Offer to take the caller's number so the employee can call back when he/she is available.

### **Other things that callers hate:**

- Mouth noises (i.e., chewing gum, eating)
- Poor screening
- Rudeness
- Hang-ups
- Call waiting

***Hot tip:*** Always thank the caller for holding when you return to the phone!

Instructor: Ask participants to discuss whether you are currently using proper hold etiquette.



## Screen calls appropriately to build trust

The only purpose for screening calls is to be able to announce the caller to the recipient. If you ask the caller for his or her name, the person receiving the call should be able to warmly greet the caller, rather than trying to figure out who is on the other end of the line. If you answer the phone and ask the caller for a name, and the caller has to then repeat their name to the recipient, it is apparent that the purpose of your screening was not to announce them but just for your own personal information.

When you are screening calls, be careful that the caller does not get the indication that they are being screened out. When the caller asks if your director (or another staff member) is available, do not respond with, “Yes, she is.” If you’ve already confirmed that the director is available, but the director doesn’t have time to take the call, there will have to be some sort of “brush off.” Instead, indicate that you will check to see if he/she is available.

### ***Example:***

**Caller:** Hello, is your director available?

**Your response:** May I tell her who’s calling? (*you didn’t say whether the director was available or not*)

**Caller:** This is Mary Bauer.

**Your response:** Thank you. Just a moment, please, Mary, and I’ll see if our director is available.

This allows you some wiggle room if Mary Bauer is someone your director does not want to make time for at the moment. You can simply return to the caller and advise her that the director is not currently available but that she will give a call back as soon as her schedule allows. Or your director might give you the name of another employee Mary Bauer should be referred to.

Avoid giving the caller a rundown of why the director isn’t available. “She’s in a meeting,” gives the caller the expectation that as soon as the meeting is over, they will get a call back. “She stepped out of her office,” gives the caller a visual of the director running away when she heard who was calling. Just stick to the simple fact that the director is unavailable.

If the caller seems desperate to know when the director might return a call, give a general timeframe. For instance, you might tell the caller you anticipate the director will be able to get back with her within the next few hours. Or maybe the director is in an all-morning

meeting, and you could tell the caller that she is unavailable in the morning but should be able to return a call in the early afternoon.

Instructor: Talk about how you currently screen calls and how you might use the provided tips to improve your performance.



## Avoid using phrases that frustrate the caller

There are some key phrases that you should avoid when speaking with callers. These phrases create tension with the caller and should be avoided:

**I don't know**  
**We can't do that**  
**You'll have to**

**I told you**  
**You don't understand**  
**Wait a minute...slow down**

Can you think of some better ways to get across the same messages?

Instructor: Go through each of the phrases to be avoided and discuss with employees better ways to handle the caller. For instance:

Phrase	Better way	Better way
<b>I don't know</b>	That's a good question. Let me see if I can find out	Let me find someone who knows a little more about that
<b>We can't do that</b>	Let's talk about how we might accomplish that	That's a tough one. Let me see what I can do.
<b>You'll have to</b>	What you'll need to do is	I might suggest that you
<b>I told you</b>	As we discussed earlier	As I mentioned previously
<b>Wait a minute...slow down!</b>	Could you please speak just a little bit slower, I'm trying to take down your thoughts/ideas so we can find a solution	

## The telephone's role in marketing

Whether it's a family member calling about a tenant, a vendor trying to sell a product to your organization, or a potential client, every telephone conversation brings with it an opportunity to generate new business for your organization. Maybe your director is not available to talk with a daughter about her mother's rent. Maybe your organization is not in a position to buy what a vendor is selling. And maybe the caller who wants more information about your organization is just a "tire kicker." But every single call brings with it a golden opportunity for you to increase your value to the organization you work for by projecting a positive, professional image.

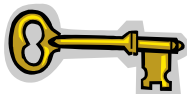


## Understand the goal of telephone marketing

**W**hen you receive a call from a potential client or a family member, you should be purpose-driven as you converse with the caller. In other words, you aren't looking for a random chat—you are both seeking and providing specific information to the caller.

Your goal as an employee who receives a telephone call is to make your program sound so appealing that nothing could keep the caller from scheduling a visit.

**Instructor:** Talk about how your program currently measures up in gathering needed information.



## Create a uniform method to gather information

**T**elephone coverage and message taking in assisted living goes way beyond the “while you were out” pad. Note pads are fine for capturing information for employees to return routine calls. But when it comes to dealing with potential clients, it's time to get out the “lead card.”

The lead card is a tool that assisted living programs can utilize to capture all pertinent information about the potential client. It is essential to know the potential client's current situation so that you can sell the caller on the advantages of choosing your assisted living program. Lead cards can serve a number of valuable purposes, including:

- Keeping the director/marketing staff advised of potential clients
- Helping the director know the caller's situation so the caller doesn't have to tell it again
- Tracking the status of all potential clients (i.e., still interested, not ready)
- Documents marketing efforts (i.e., packet mailed, tour scheduled, etc.)
- Shows whether marketing efforts (i.e., ads, family referrals) are effective
- Serves as a reference for every staff member answering the telephone
- Helps your program build a database of potential clients for direct mailing efforts



## Organization helps your program track information

**Instructor:** Introduce the lead card sample, or the lead card you are currently using. Let participants make suggestions about the layout or content.

**T**he lead card is designed to help capture every piece of information your organization has deemed important in its marketing efforts. You may be a bit uncomfortable asking

the caller, "May I ask where you heard about us?" But your program may have invested a considerable amount of time and effort in developing advertisements or building relationships, and the only way to know if efforts are effective is to simply ask the caller.

### **Tips for using the lead card:**

Capture the name when the caller identifies himself/herself, but do not ask for address and phone number immediately. The first task at hand is to build rapport and to make the caller feel comfortable. Asking for personal information up front gives the call a "sales" feel, and callers will spend a considerable amount of time telling you they are "just looking," to avoid being pressured.

Here's a suggested order of events:

1. Jot down the caller's name when they give it.
2. Thank the caller for calling your program.
3. Let the caller know your name and your position with the organization.
4. Ask, "May I ask how you heard about us?"
5. Ask if the caller is looking for assisted living for herself/himself or a family member (if they haven't already told you so).
6. Invite the caller to tell you "a little bit about the person"
7. As the caller talks about the prospect's current situation, use the lead card to ask questions and gather additional information ("Is your mother able to get dressed without assistance?" "Does your mother take any medications?" "Does your mother have any major health issues?" "Is your mother able to take care of her own toileting needs?" "Is your mother able to shower or bathe independently?")
8. Listen attentively while the caller provides necessary information
9. If the caller is a daughter who has been providing care to her mother, acknowledge the daughter's contribution ("I know it can be very difficult to try to care for an elderly parent, and it sounds like you've done a great job taking care of your mom.")
10. After you have gathered all necessary information, begin to talk about all your program can offer, based on the established needs of the prospect. ("You indicated your mother does not take her medications appropriately. We can provide 24-hour-a-day supervision and we have an R.N. that oversees tenant's medications. Staff can remind tenants to take medicine, or we can administer them in the tenant's room.")
11. When you have finished advising the caller of all your program has to offer, extend an invitation to come in for a tour and a complimentary meal. If the caller doesn't want to commit to a specific time, advise that he/she can stop by anytime for a tour.
12. If the caller declines to be scheduled for a tour, ask if you can put some information in the mail. This is a good time to ask for the correct spelling of the caller's name, the address and the phone number.
13. Ask permission to have the marketing director or program director contact them within the week to see if they received written information and to answer any questions they might have.
14. Ensure that you have the proper spelling of the caller's name, and repeat the address and phone number to ensure you have correct information.

15. Thank the caller for their interest and wish them well in their search for the right choice.

Instructor: Read through the suggested order of events and then allow participants some time to role play. Have attendees write down the things the role players did correctly and some things that could be improved.



## Dealing with the “Big Four”

Instructor: After reading each question, stop and discuss how you are currently handling these questions.

People don't make a decision to enter your facility based solely on a phone conversation. But they can make a decision not to consider your program, depending on how you respond to some key questions they might ask.

Many times a family member has been asked to do some ground work for the senior who may be interested in assisted living. Pricing from one assisted living program to the next is not generally consistent, as programs have many different billing structures. Some provide all needed services for one set price (all-inclusive pricing), some programs choose a service level structure, where there is a correlation between the packaged service hours and price, and some choose an ala carte system, where tenants choose and pay for only the services needed on a monthly basis. And, of course, the size of the room always influences the price. This can create a great deal of confusion for consumers, because they cannot compare “apples to apples.”

Your response to the “big four” can determine whether you are able to convince the prospect to give your program serious consideration. Follow the suggestions below to ensure that your response does not result in a lost client for your organization.

### **#1: What are your rates?**

Because affordable assisted living programs have a unique cost and billing structure, you won't be able to offer specific rate information over the phone. Pricing in affordable assisted living programs can be complicated, depending on the client's income and assets and the number of subsidy programs involved. Each tenant's costs for rent and services are unique, and many programs have no two clients who pay the same rate.

You want to encourage the caller to come in and take a look at all you have to offer. You can offer to conduct a free financial and health assessment, so that you can provide specific costs. Here are a couple of ways you can frame this conversation for the caller who seems determined to squeeze a specific price out of you:

“We would need to conduct a free assessment to determine your mother's needs, and she would need to choose an apartment size. We would have to take a look at her

income, assets, and health care needs, and then we would be able to tell you the exact cost.”

“Some of our clients pay as low as \$300 (or whatever your lowest package might be) a month for rent and services, but some pay considerably more. Rent and services are based on income, assets, and health care needs. Some clients also qualify for assistance with the cost of health care. We can conduct a free assessment and then we would be able to give you a specific price.”

Instructor: Talk with staff about how you are currently giving out rates and how you might be more consistent.

## ***#2: What kinds of services can you provide?***

When people are seeking information about assisted living programs, they want to be able to compare one program to another. They may have a checklist of things that are important to them. Iowa assisted living law allows providers a great deal of flexibility in determining what kinds of services they want to provide. If the caller's mother has dementia, she may be specifically interested in what kinds of oversight you can provide to prevent wandering.

It is important that you know enough about the prospective client's needs to be able to answer questions in a manner that peaks the interest of the caller. If you know the prospective client enjoys walking, talk about your tenant walker's club. If falls are an issue, talk about hand railings on both sides of the hallway, emergency response procedures, and remind the caller that you have an R.N. that can work with the family and the physician to develop a falls prevention plan.

Instructor: Talk about how you are communicating your services at the present time and how you might do a better job of selling your program through the services you offer.

## ***#3: Can you take my mom to doctor's appointments?***

Many times a caller has been taking care of a loved one in the home. The demands of caring for a parent while raising their own children can eventually become overwhelming, and they are now to the point that they are willing to consider alternative arrangements. Sometimes the child is able to manage the care needs, but they cannot keep up with medical appointments. They are using vacation to shuttle the parent back and forth to different appointments, and they finally become physically and emotionally exhausted.

Your program may not have a van to take clients to medical appointments. But what other resources do you have to help meet the transportation needs of clients? Maybe your program arranges a community van for seniors to transport clients to appointments. Maybe the program is willing to pay for taxi service to appointments. Or maybe the

program has enough staff to be able to send a caregiver or nurse with the client to the appointment in a private vehicle.

Transportation for some clients will be covered under government subsidy programs, and some clients may be assessed a small fee for the cost of transportation. Use whatever means available to your program to help meet the transportation needs of clients, as assistance in getting the client to doctor's appointments is a high priority for most clients and their family members.

**Instructor:** How are you currently transporting clients and what are some ideas you might want to try to better meet the needs of your clients.

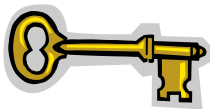
#### **#4: *What if my mom's condition gets worse?***

**T**he decision to consider assisted living is not made easily, and it usually comes at a point where the individual's health is in a significant state of decline. If the individual suffers from a progressively debilitating disease, families will want to know how long the individual will be able to stay in your program. It is very difficult for frail seniors to withstand a move, and the family will want assurances that you can keep the client for a significant period of time.

Your program will have occupancy and discharge criteria, which will be made available to prospective clients before they sign a lease and service agreement. This allows families to make an informed decision about whether your program is right for their loved one. Programs with a dementia unit have great ability to care for clients suffering from dementia, even in the advanced stages of the disease.

If you are fielding telephone calls, you should have a good understanding of what kinds of services your program delivers and what kinds of issues would trigger a discharge. You can assure the caller that your nurse will be working with the prospect's physician to manage all aspects of healthcare. If the client's condition worsens to the point that alternative placement is imminent, the tenant and family will be intimately involved in those discussions. Letting the caller know that there will be no surprises when it comes to discharge or transfer gives them a greater level of comfort about their decision.

**Instructor:** Identify whether employees are familiar with your occupancy and discharge criteria and talk about how these can be communicated to families in a consistent, professional manner.



### **You have the power....**

**Y**ou have the power to create a visual image of your facility that is so intriguing that people will just have to see it to believe it. Your demeanor and professionalism speak volumes about you and the organization you work for. It's a simple concept: Nobody wants to live or place a loved one in a program where crabby, disinterested people are providing care.



While callers and guests will probably want to meet your program's management, the decision to choose a program will ultimately be made based on the prospect's perceptions of the care-giving staff. You are the backbone of your organization, and you are in a unique position to market all that you and the organization have to offer. Understanding the basics of telephone etiquette and marketing empowers you to increase your value and improve the image of your organization. By keeping a positive attitude and projecting a professional image, you can create a better living environment for tenants and a better work life for you and your fellow employees. Use your incredible powers for good, and you will reap the benefits both personally and professionally.

**Instructor:** Reaffirm that every employee has the opportunity to gain and lose business for your organization and the important role employees play in customer satisfaction and effective marketing.

### Post-Test

Ask participants to complete the post-test, provide the correct answers, and then discuss areas of improved understanding. Give a prize for the best pre-test and the employee who showed the greatest improvement from pre-test to post-test.

## Testing...one, two Telephones and AAL marketing

Projecting a positive image for your organization

Name: \_\_\_\_\_

Pre-test answers	Question	Post-test answers
a. Stop it from ringing b. Get rid of the caller c. Give and gather important information d. Visit with friends and family members	<b>1. The purpose of answering the telephone is to:</b>	a. Stop it from ringing b. Get rid of the caller c. Give and gather important information d. Visit with friends and family members
True      False	<b>2. It's okay to tell a caller that you don't know how to transfer them.</b>	True      False
a. Ask a fellow employee over and over again; b. Get out the telephone handbook every time; c. Make a small cheat sheet to carry with you; d. Hand the ringing phone to your co-worker	<b>3. The best way to manage the key functions of your phone is to:</b>	a. Ask a fellow employee over and over again; b. Get out the telephone handbook every time; c. Make a small cheat sheet to carry with you; d. Hand the ringing phone to your co-worker
a. Within two rings b. Within three rings c. Within four rings d. By the director	<b>4. The telephone should always be answered:</b>	a. Within two rings b. Within three rings c. Within four rings d. By the director
a. Buffer, organizational name, and your name b. Grumbling, growling, and your co-worker's name c. Hi, hello, and how do you do? d. Your full name, date of birth, and social security number	<b>5. The three part telephone greeting includes:</b>	a. Buffer, organizational name, and your name b. Grumbling, growling, and your co-worker's name c. Hi, hello, and how do you do? d. Your full name, date of birth, and social security number
a. For no more than ten minutes b. For no more than 30 seconds c. Until I finish what I was doing when I picked up the phone d. Until they hang up	<b>6. Callers should be put on hold unattended:</b>	a. For no more than one ten minutes b. For no more than 30 seconds c. Until I finish what I was doing when I picked up the phone d. Until they hang up

a. Find out who is calling b. Announce the caller to the intended recipient c. Find out what you're co-worker's sister is up to d. Get rid of would-be job applicants	<b>7. The only valid purpose for screening calls is to:</b>	a. Find out who is calling b. Announce the caller to the intended recipient c. Find out what you're co-worker's sister is up to d. Get rid of would-be job applicants
a. Say, "I don't know" b. Find someone who can c. Ask the caller to call back later d. Hang up	<b>8. If you can't personally help the caller you should:</b>	a. Say, "I don't know" b. Find someone who can c. Ask the caller to call back later d. Hang up
a. The call could be your next admission b. It helps others handle future calls appropriately c. Both of the above d. Neither of the above	<b>9. It's important to keep track of marketing calls because:</b>	a. The call could be your next admission b. It helps others handle future calls appropriately c. Both of the above d. Neither of the above
a. It directly affects my paycheck b. It helps me field marketing calls more thoroughly and professionally c. I don't want to appear to be out of the loop d. I will get fired if I don't	<b>10. It's important for me to know important information (such as what kind of services our program provides and how we charge clients) because</b>	a. It directly affects my paycheck b. It helps me field marketing calls more thoroughly and professionally c. I don't want to appear to be out of the loop d. I will get fired if I don't
<b># of pre-test correct answers</b>		<b># of post-test correct answers</b>

Name of employee: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Name of Caller: \_\_\_\_\_

- ☐ Call  
☐ Tour  
☐ E-mail  
☐ Letter  
☐ Other \_\_\_\_\_

Phone Number: (home) \_\_\_\_\_ (work/cell) \_\_\_\_\_

☐ Calling on behalf of self  
 (or)

☐ Calling on behalf of friend or relative: \_\_\_\_\_  
 Name of prospect Relationship to caller

Address of caller: \_\_\_\_\_  
 City State Zip

Referral source: ☐ Hospital ☐ Drove by ☐ Current Resident \_\_\_\_\_  
☐ Newspaper ad ☐ Yellow pages ☐ Professional \_\_\_\_\_  
☐ TV ad ☐ Church ☐ Nursing home: \_\_\_\_\_

Current living situation & issues creating a need for AL \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

What are the current capabilities of the individual in regard to:

Bathing: \_\_\_\_\_ Dressing: \_\_\_\_\_ Grooming: \_\_\_\_\_

Laundry: \_\_\_\_\_ Housekeeping: \_\_\_\_\_ Laundry: \_\_\_\_\_

Medications: \_\_\_\_\_ Incontinence Issues: \_\_\_\_\_ Meal Prep: \_\_\_\_\_

Transportation \_\_\_\_\_ Hearing \_\_\_\_\_ Visual \_\_\_\_\_

Transferring \_\_\_\_\_ Social \_\_\_\_\_ Confusion: \_\_\_\_\_

Ambulation – ☐ Ambulates independently, without assistive devices  
☐ Uses walker ☐ Uses wheelchair  
☐ Uses cane ☐ Uses motorized cart

HCBS Elderly Waiver: ☐ Currently enrolled ☐ Applied for ☐ Status unknown

Annual income: \_\_\_\_\_ Assets: \_\_\_\_\_

Major health issues: \_\_\_\_\_

Tour scheduled: No (reason): \_\_\_\_\_ Yes (date &amp; time): \_\_\_\_\_

Information packet sent (date): \_\_\_\_\_

(Use reverse side to document follow-up)

**Examples of follow-up**

- ☒ Personal note sent by Director (date: August 10, 2005)
- ☐ Tour scheduled for (date: \_\_\_\_\_)
- ☐ Follow-up call (date: \_\_\_\_\_)

August 15, 2 p.m.: Called daughter to see if they received the information packet sent on 8/10/05. Info was received.. Brother is coming to town Labor Day weekend and they are going to try to tour some AL programs. Invited daughter to schedule a tour. Says she will call back and schedule a time when the brother arrives.

August 30, 2005: Received a call from daughter. They will tour on Saturday, September 3 at 3 p.m. Director will come in for tour.

September 3, 2005: Family toured (mother, daughter & son). They liked room 102. Also toured Famous Amos assisted living and Starlight Village. Will make decision within the next few days. Follow-up on Tuesday, September 5 if we haven't heard from family.

## Answer key for pre- and post-tests

1. c

2. false

3. c

4. b

5. a

6. b

7. b

8. b

9. c

10. b